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evidence and ideas. applied

Demand Under the Ban –
China Ivory Consumption Research 2019

Report presentation by GlobeScan and WWF

31 October 2019

Our Panelists: WWF team

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Presenters: GlobeScan team

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Agenda

1. Introduction (by WWF) – 10 minutes

2. Research Presentation (by GlobeScan) – 45 minutes
   - Research description and methodology
   - Consumer segments and purchase patterns
   - Awareness and perceptions of the ivory ban
   - Ad recall, campaign awareness and effectiveness
   - Recommendations

3. Q&A (with all participants) – 30 minutes

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Research description and methodology

Methodology Overview: Post-ban Quantitative Survey

Methodology and Sample: Post-ban quantitative survey

- Conducted online; respondents invited via email

- Questionnaire median length 17 minutes

- Fieldwork from May 29th to July 19th, 2019

- Sample size n=2095 (unweighted), weighted towards n=2000, for easy comparison with the pre-ban survey and Post-ban 2018 Survey, which also had a weighted total of n=2,000

- Margin of error of 2.1 percent (for the total sample)

Comparison with other surveys

- **Key metrics cannot be compared 1-on-1 with other surveys**.

- This **2019 Post-ban Survey** follows the **2017 Pre-ban Survey** conducted in Sept - Oct 2017 and the **2018 Post-ban survey** conducted in May – July 2018 with the same methodology and the same sampling plan, making these three surveys comparable.

- While the data/key metrics are specific for the 15 cities, the underlying patterns on segmentation, purchase behavior and communications are relevant for the ivory buyers, and the results are crucial input for campaigns.

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We are starting to build up multi-year longitudinal knowledge

Geographic Scope

Definition: City layers

Cities were divided into layers 1, 2, and 3 per TRAFFIC's definition to reflect the ivory trade and consumption in major cities in China. Grouping cities by layers allows for comparisons on the dynamics of ivory trade to be made between types of markets (cities).

TRAFFIC nominated these cities as being strategic and active centers of the ivory trade in China, **rather than being representative of China as a whole**.

Hangzhou was added to the survey with *n* = 200 respondents. To keep the results comparable to previous years Hangzhou data were analyzed separately.

Legend:
- Layer 1 cities
- Layer 2 cities
- Layer 3 cities
- Hangzhou

Map labels: Shenyang, Beijing, Tianjin, Jinan, Xi'an, Nanjing, Shanghai, Hangzhou, Chengdu, Chongqing, Fuzhou, Xiamen, Kunming, Nanning, Guangzhou, Shenzhen

Coverage by city

- *n*=927 in **Layer 1** cities
- *n*=459 in **Layer 2** cities
- *n*=614 in **Layer 3** cities
- n=200 in Hangzhou
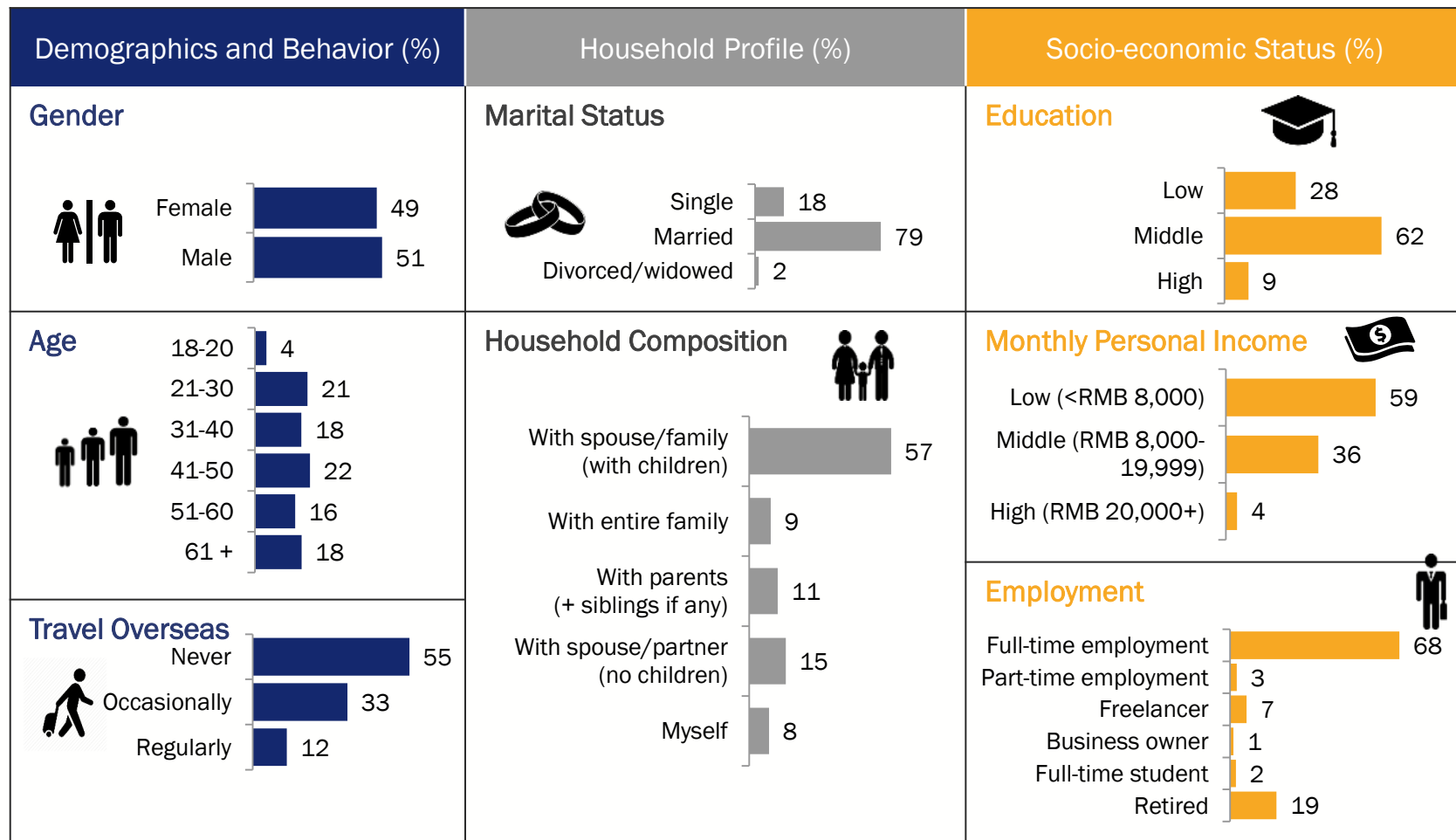
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Consumer segments and Purchase patterns

Total Sample Profile – Post-ban Survey 2019

Demographics and Behavior (%)	Household Profile (%)	Socio-economic Status (%)

Gender
- Female — 49
- Male — 51

Marital Status
- Single — 18
- Married — 79
- Divorced/widowed — 2

Education
- Low — 28
- Middle — 62
- High — 9

Age
- 18-20 — 4
- 21-30 — 21
- 31-40 — 18
- 41-50 — 22
- 51-60 — 16
- 61 + — 18

Household Composition
- With spouse/family (with children) — 57
- With entire family — 9
- With parents (+ siblings if any) — 11
- With spouse/partner (no children) — 15
- Myself — 8

Monthly Personal Income
- Low (<RMB 8,000) — 59
- Middle (RMB 8,000-19,999) — 36
- High (RMB 20,000+) — 4

Travel Overseas
- Never — 55
- Occasionally — 33
- Regularly — 12

Employment
- Full-time employment — 68
- Part-time employment — 3
- Freelancer — 7
- Business owner — 1
- Full-time student — 2
- Retired — 19

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10

Market Segmentation

- Market segmentation identifies similarities in the **behaviors, intentions, attitudes and motives of consumers**, and divides the population into natural groups based on these similarities.

- Market segmentation allows organizations to identify groups for strategic communications and to track the segments over time to see how public perception shifts between years.

- For the 2017 Pre-ban survey, we developed a customized segmentation that we have continued to employ in our surveys since, in 2018 and in 2019 again.

- We identified segments of the population that share similar patterns of responses to the questions on **past purchase, intention to purchase, barriers to purchase, attitudes towards the ivory ban, and advocacy for ivory consumption**.

- We used **predictive modeling to separate the population** into three distinct groups:
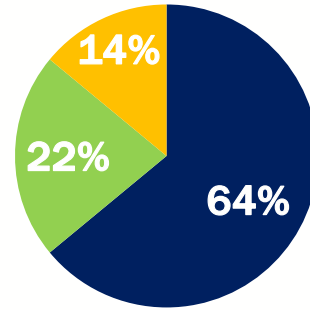
Diehard Buyers   Ban Influenced Citizens   Rejectors

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Segmenting the Market

Diehard Buyers

- Diehard Buyers are those who are least likely to be swayed from purchasing ivory

- They are more likely to be male, have a high income, have a high education, and travel more regularly

- Their intention to purchase ivory in the future is high, despite the ivory ban

- They have the lowest rates of knowledge that ivory is illegal to transport internationally

Ban Influenced Citizens

- The ban on ivory trade is the main deterrent for Ban Influenced Citizens

- They tend to be female, have a higher education, and have a medium income

- Before being prompted about the ivory ban, 60 percent of this segment said they were likely to purchase ivory in the future. After being prompted about the ban, this percentage dropped to 0

Rejectors

- Rejectors are those who are least likely to purchase ivory

- They tend to have a mid-level of education, a lower income, and tend not to travel

- Rejectors are strongly concerned about the extinction of elephants and animal cruelty

- Rejectors have a lower rate of campaign awareness but a more positive response to the campaigns

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Buyer Segments Distribution – Three-year Comparison

Total Sample (*n*=2000)

2017 Pre-ban | 2018 Post-ban

- Diehard Buyers: 19 (2017), 14 (2018), (2019)
- Ban Influenced Citizens: 31 (2017), 22 (2019)
- Rejectors: 50 (2017), 64 (2019)

Differences across the country are leveling out – China is becoming economically more homogeneous

2018 | 2019

18 | 70 | 17 | 14 | 63 | 22 | 15
33 | 16 | 68 | 13 | 19 | 64 | 22 | 14
44 | 35 | 21 | 79 | 11 | 10 | 65 | 22 | 13

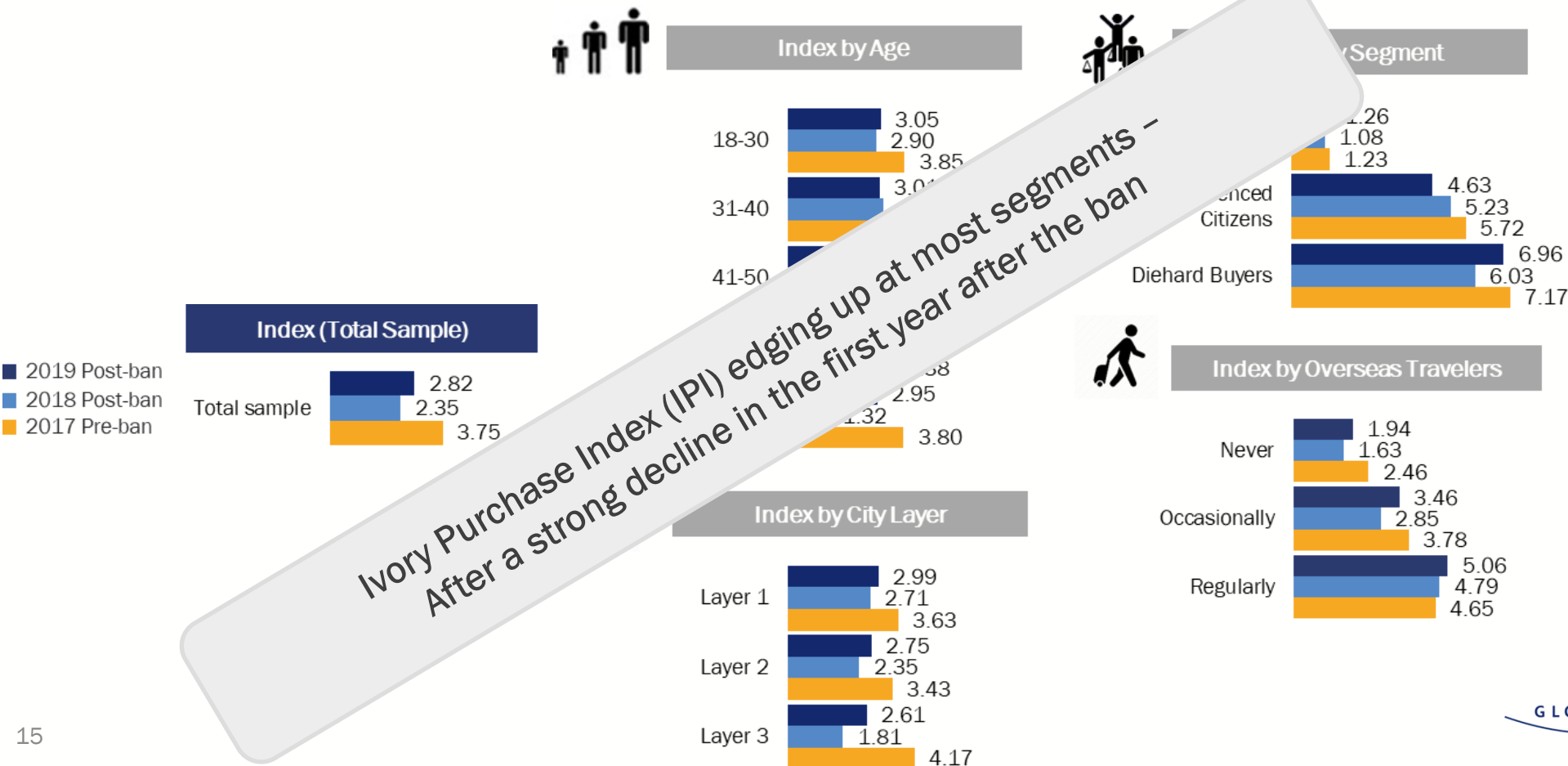GLOBESCAN
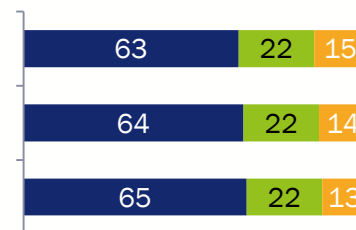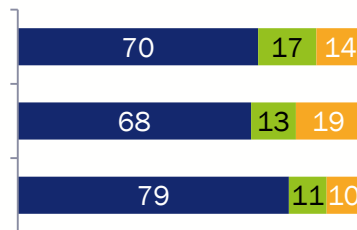
Ivory Purchase Index

Definition

- The Ivory Purchase Index can be considered as a barometer or a measure of ivory buyers' persistence

- It allows us to customize strategies and messages for specific sub-groups, e.g., **buyer segments, city layers, age groups**, etc. and helps to see the overall picture, i.e. who are the most persistent ivory buyers.
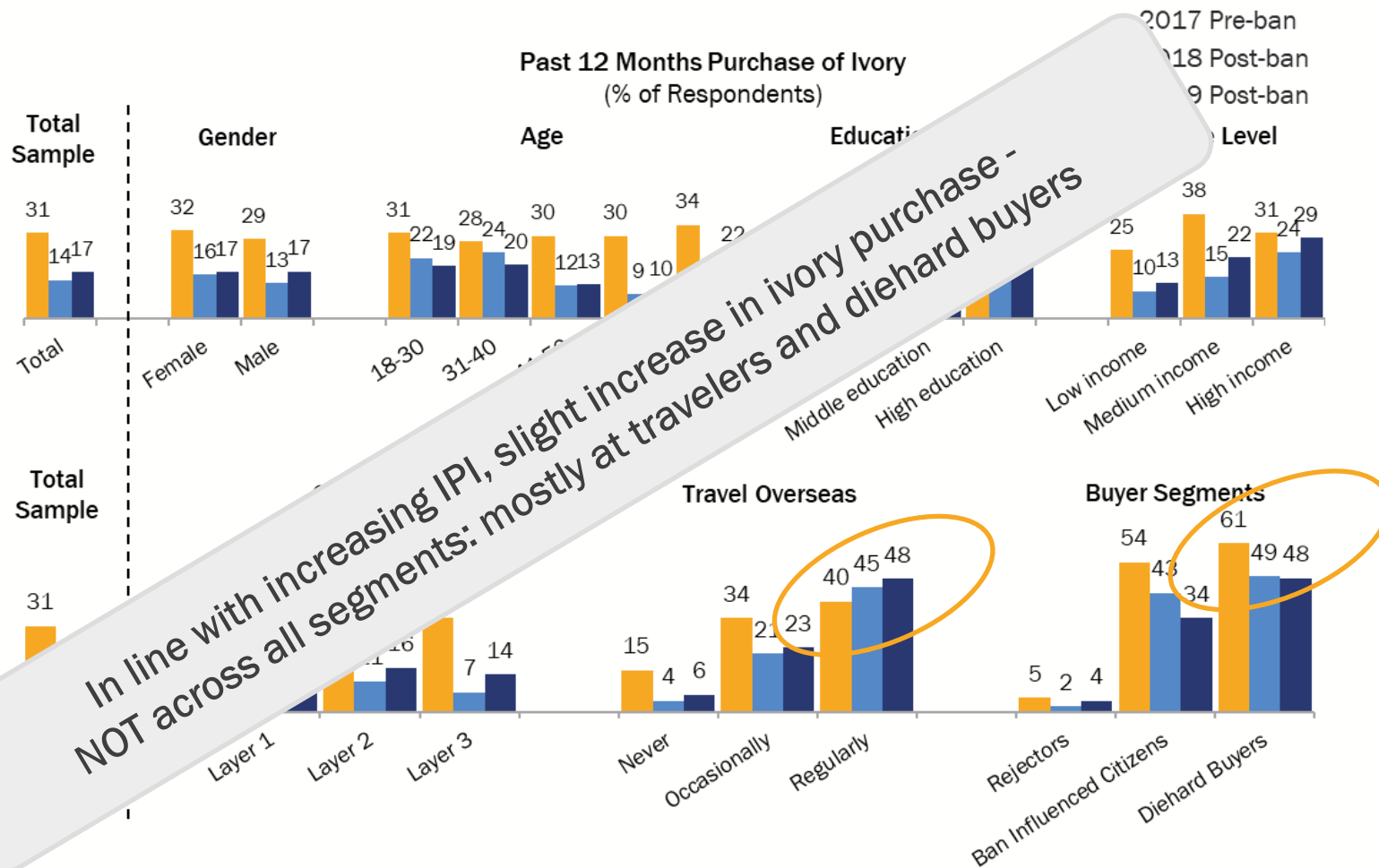
How Is it Compiled?

- The Ivory Purchase Index was developed by reducing all attributes that were related to past and future purchase of ivory down to three dimensions: (1) Past purchase; (2) Future purchase and (3) Impact of the ivory ban (i.e. future purchase of ivory after implementation of the ban and recommendation to purchase ivory after implementation of the ban).
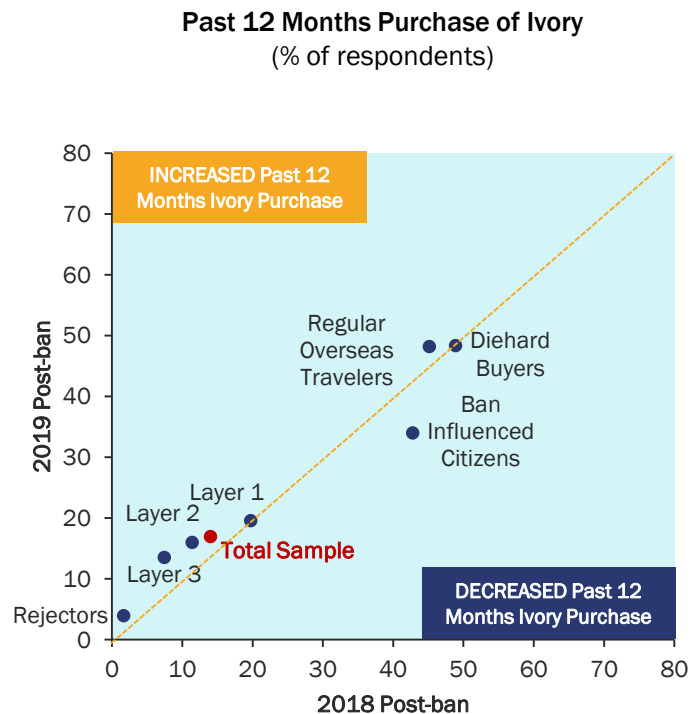
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Ivory Purchase Index – Three-year Comparison

Index by Age

	2019 Post-ban	2018 Post-ban	2017 Pre-ban
18-30	3.05	2.90	3.85
31-40	3.0_		
41-50			

Index (Total Sample)

- 2019 Post-ban
- 2018 Post-ban
- 2017 Pre-ban

	2019 Post-ban	2018 Post-ban	2017 Pre-ban
Total sample	2.82	2.35	3.75

Index by Segment

	2019 Post-ban	2018 Post-ban	2017 Pre-ban
	1.26	1.08	1.23
...enced Citizens	4.63	5.23	5.72
Diehard Buyers	6.96	6.03	7.17

Index by Overseas Travelers

	2019 Post-ban	2018 Post-ban	2017 Pre-ban
Never	1.94	1.63	2.46
Occasionally	3.46	2.85	3.78
Regularly	5.06	4.79	4.65

Index by City Layer

	2019 Post-ban	2018 Post-ban	2017 Pre-ban
Layer 1	2.99	2.71	3.63
Layer 2	2.75	2.35	3.43
Layer 3	2.61	1.81	4.17

Ivory Purchase Index (IPI) edging up at most segments – After a strong decline in the first year after the ban

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Purchase of Ivory *in Past 12 Months* – Three-year Comparison

Past 12 Months Purchase of Ivory
(% of Respondents)

2017 Pre-ban
2018 Post-ban
2019 Post-ban

In line with increasing IPI, slight increase in ivory purchase - NOT across all segments: mostly at travelers and diehard buyers

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Past and Future Purchase – Trends for Key Sub-groups, 2018 vs 2019

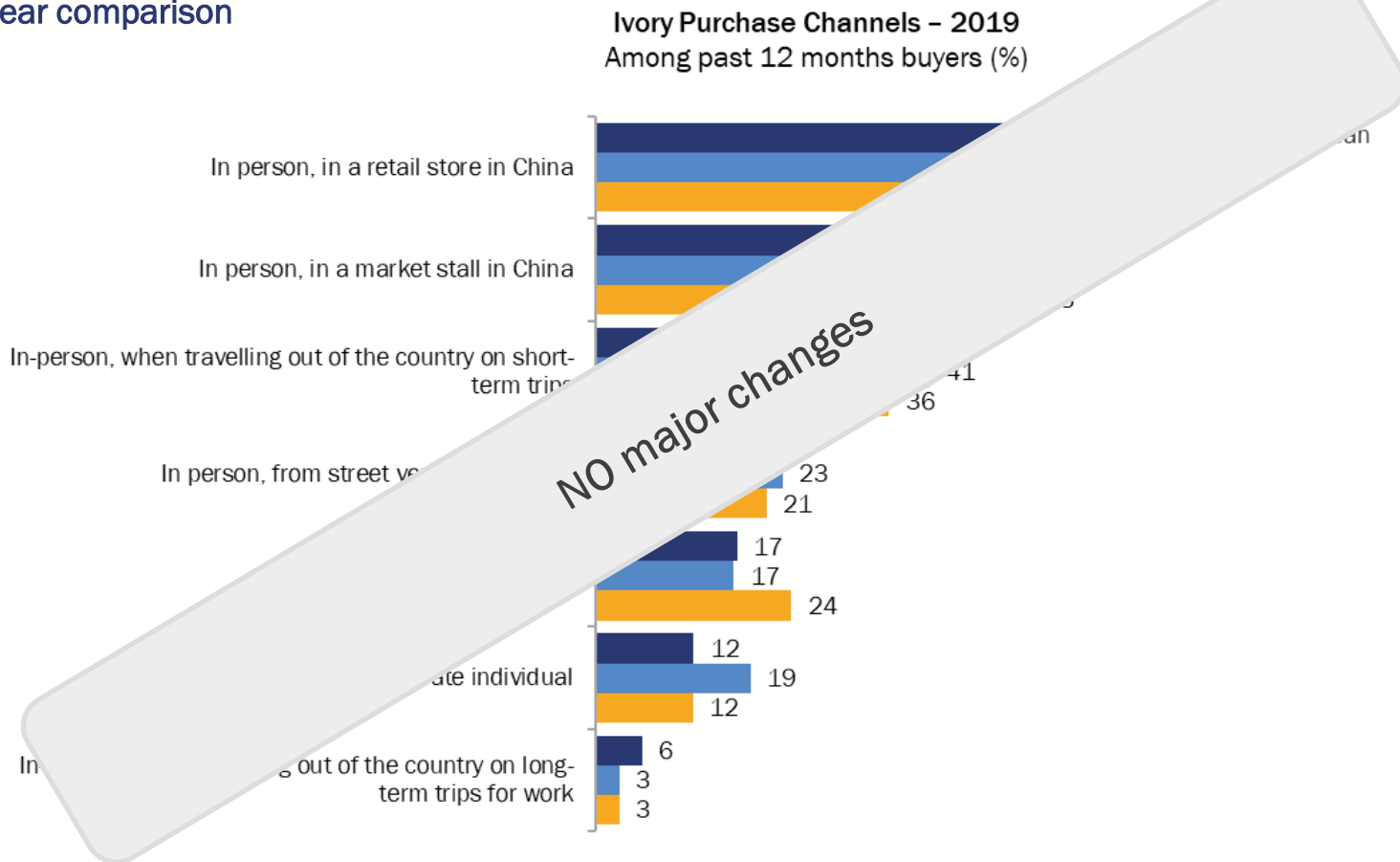**Past 12 Months Purchase of Ivory**
(% of respondents)

INTENTION to Purchase Ivory in the Next 12 Months
(before prompting of the ban)
(% of respondents)

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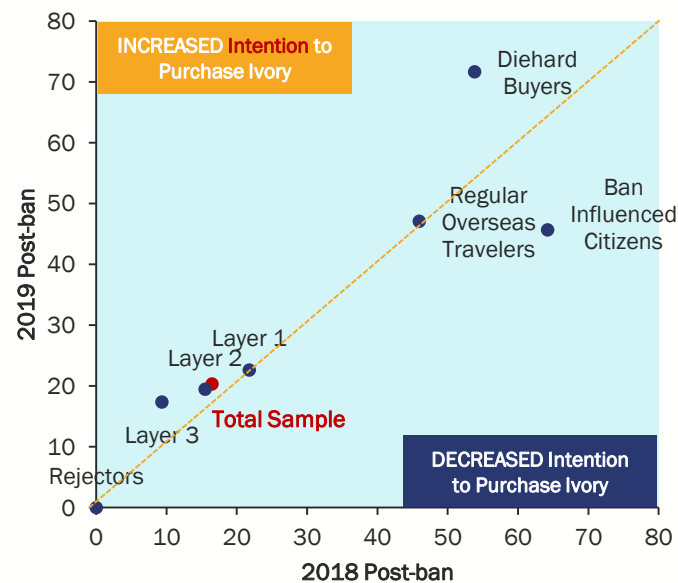
Ivory Purchase Channels – Three-year Comparison

Three-year comparison

Ivory Purchase Channels – 2019
Among past 12 months buyers (%)

In person, in a retail store in China

In person, in a market stall in China

In-person, when travelling out of the country on short-term trips

In person, from street ve...

...te individual

In... g out of the country on long-term trips for work
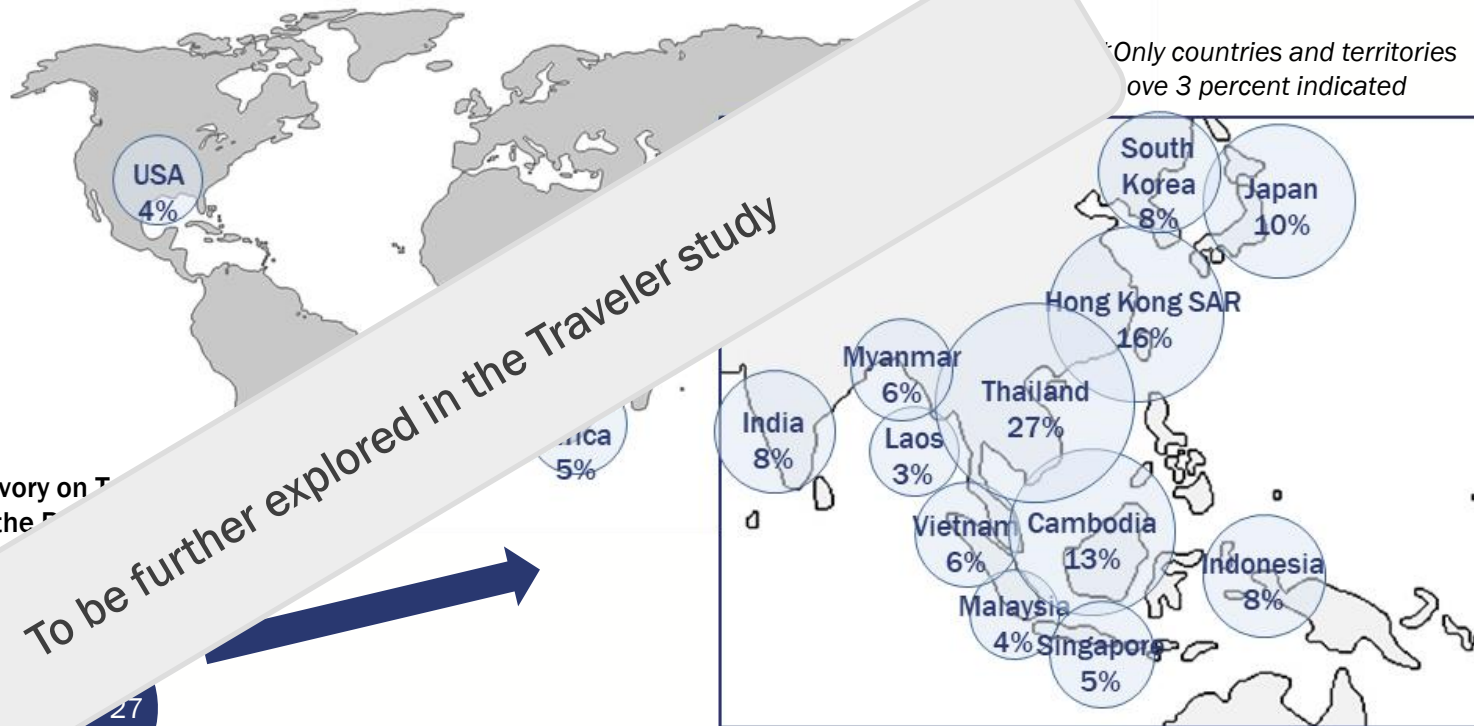
NO major changes

41
36
23
21
17
17
24
12
19
12
6
3
3

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Ivory *Ever* Purchase Outside Mainland China

Countries and Territories* where Products Made from Ivory Were Bought on Trips Outside Mainland China
(% Among those who bought ivory outside Mainland China)

*Only countries and territories above 3 percent indicated

USA
4%

South Korea
8%

Japan
10%

Hong Kong SAR
16%

Myanmar
6%

Thailand
27%

India
8%

Laos
3%

...ica
5%

Vietnam
6%

Cambodia
13%

Indonesia
8%

Malaysia
4%

Singapore
5%

**% Who Bought Products Made from Ivory on T...
Outside Mainland China Ever in the ...**

2018

- Purchased
- Did not purchase
- Not sure

27

To be further explored in the Traveler study

Note: The prominence of some destinations over others may reflect the popularity of these areas as holiday destinations. The format of travel question was refined between 2018 and 2019. In 2018, and results are therefore not directly comparable

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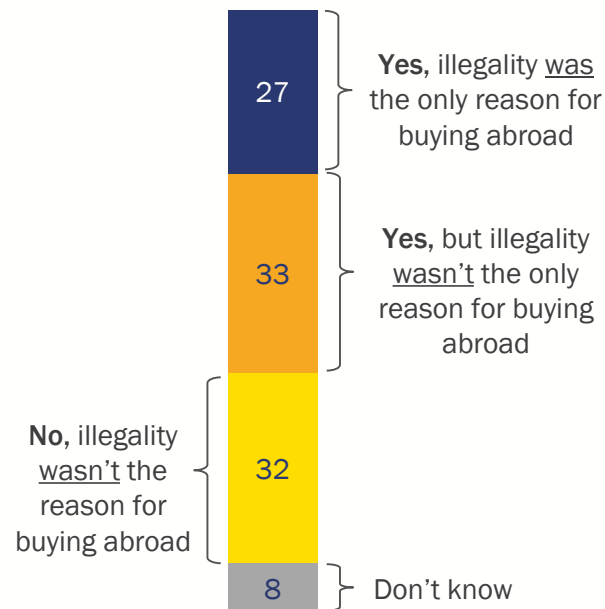
19

Reasons for Purchasing Ivory Outside Mainland China
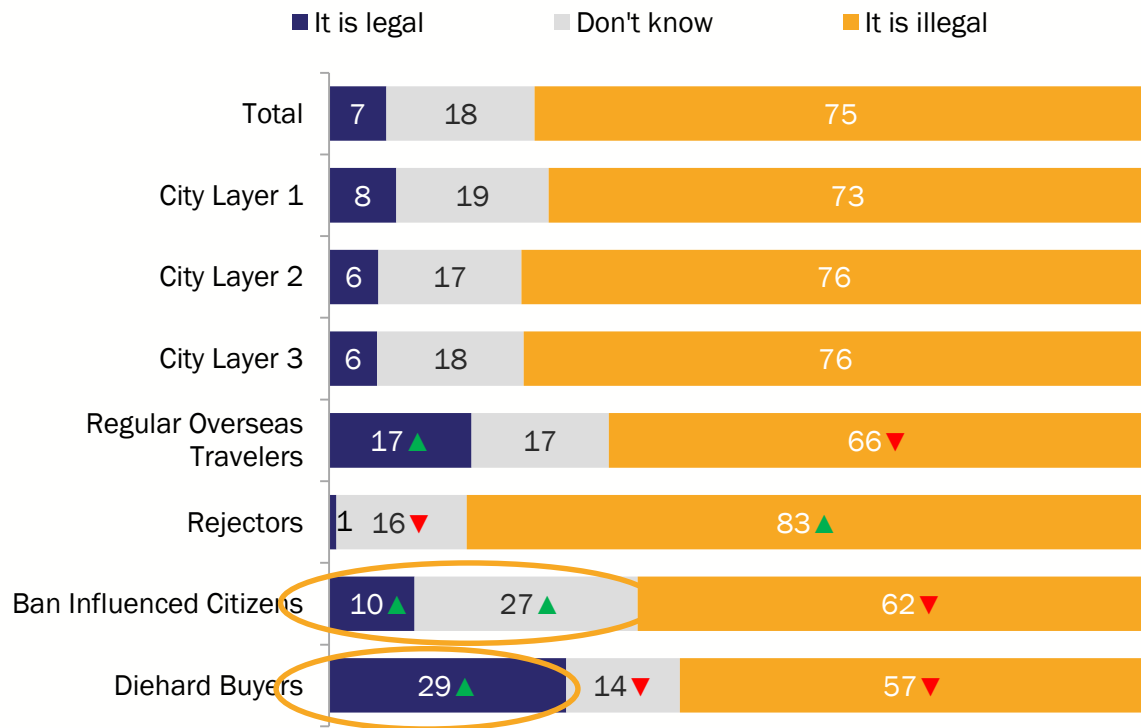
Why did you buy ivory products abroad?
(% of Respondents)

Reason	Value
Only decided to buy when I saw it in a market/ from street vendors	36
As a souvenir from my holidays	36
Only decided to buy when I saw it in a shop/store (e.g. retail store, jewelry store, etc.)	35
Tour guide / sales person recommended it to me	29
Saw the product(s) online and knew that I could buy it abroad	18
I wanted to offer a gift to someone	11
It can't be bought in Mainland China	11
I planned to buy the product(s) abroad before my trip	8
Someone told me I could buy the product abroad	7
It was cheaper than in Mainland China	6
Someone asked me to buy it for him/her	2

And Did You Buy Ivory Products Abroad Because They Are Illegal in Mainland China?
(% of Respondents)

- 27 — **Yes**, illegality <u>was</u> the only reason for buying abroad
- 33 — **Yes**, but illegality <u>wasn't</u> the only reason for buying abroad
- 32 — **No**, illegality <u>wasn't</u> the reason for buying abroad
- 8 — Don't know

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Bringing Ivory Products Back to China

Do You Know Whether Taking Ivory Products Back to China Is Legal or Not? – 2019 (%)

■ It is legal ■ Don't know ■ It is illegal

	It is legal	Don't know	It is illegal
Total	7	18	75
City Layer 1	8	19	73
City Layer 2	6	17	76
City Layer 3	6	18	76
Regular Overseas Travelers	17 ▲	17	66 ▼
Rejectors	1	16 ▼	83 ▲
Ban Influenced Citizens	10 ▲	27 ▲	62 ▼
Diehard Buyers	29 ▲	14 ▼	57 ▼

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Identification of Real Ivory

Based on Ivory Ever Buyers

Top Three Opinions on Fake Ivory on the Market
(% among Ivory Ever Buyers)

I am not always sure whether the ivory on display is real or not. **46%**

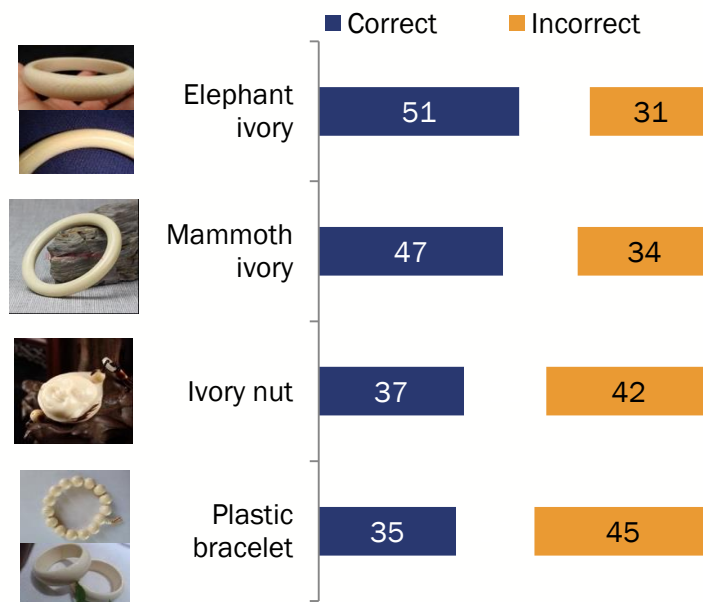I can distinguish elephant ivory from fake ivory (made from plastics). **39%**

I can distinguish elephant ivory from ivory from other animals, like hippo or walrus. **30%**

Can You Tell if the Object Is Made of Real Ivory or Not?
(% among Ivory Ever Buyers)

■ Correct ■ Incorrect

	Correct	Incorrect
Elephant ivory	51	31
Mammoth ivory	47	34
Ivory nut	37	42
Plastic bracelet	35	45

Note: On this question, both elephant and mammoth ivory are considered "real ivory," as the question did not specify ivory from a particular species.

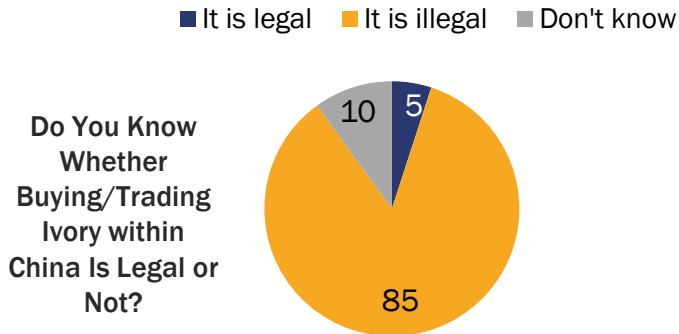GLOBESCAN

Awareness of and Attitudes toward the Ivory Ban

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Necessity of Legal Control over the Trade of Ivory

Do You Know Whether Buying/Trading Ivory within China Is Legal or Not?

- ■ It is legal
- ■ It is illegal
- ■ Don't know

Pie chart values:
- 5 (It is legal)
- 85 (It is illegal)
- 10 (Don't know)

% Agree on Legal Control over the Trade of Ivory – 2019*
(% Top-2-Box, 4+5: "I Would Support a Total Ban on All Buying, Selling, Importing, and Exporting of Ivory")
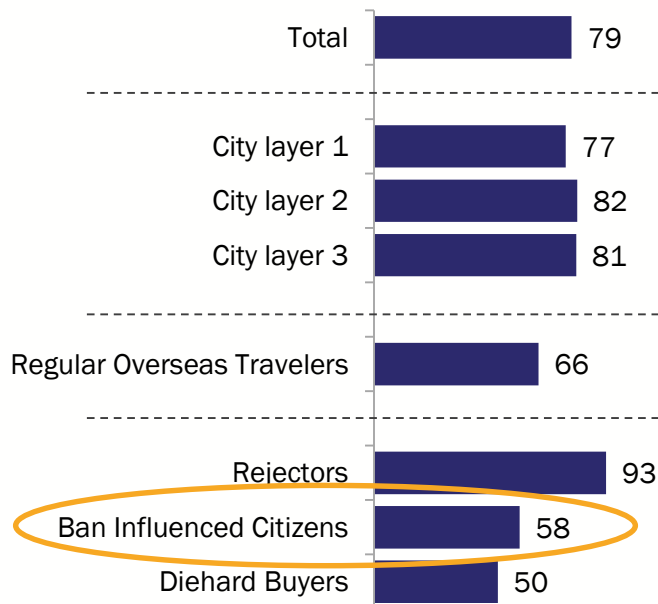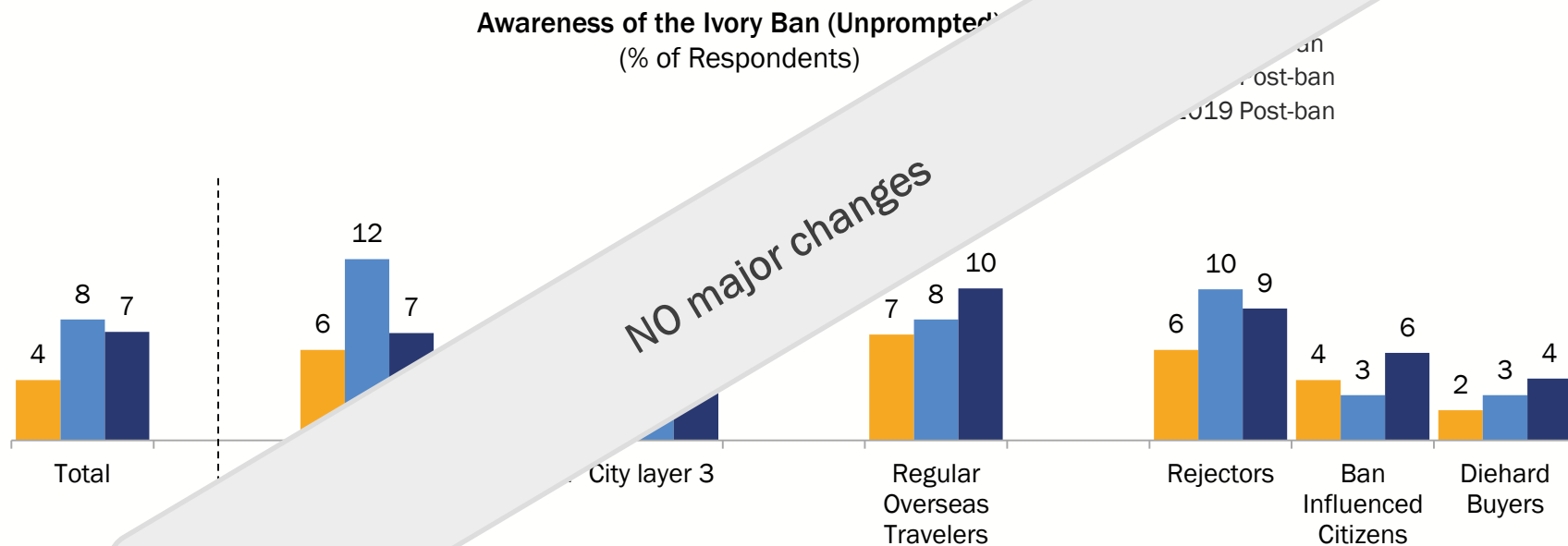
	2019* % Agree	Top-2-Scores on a 5-point scale (5 = Total Ban) – How Much Control There Should Be for Ivory (%)	
		2017	2018
Total	79	73	87
City layer 1	77	75	84
City layer 2	82	75	88
City layer 3	81	68	91
Regular Overseas Travelers	66	70	72
Rejectors	93	94	96
Ban Influenced Citizens	58	57	62
Diehard Buyers	50	45	67

Note: These results reflect the opinion of consumers before they were asked to read the ivory ban notice
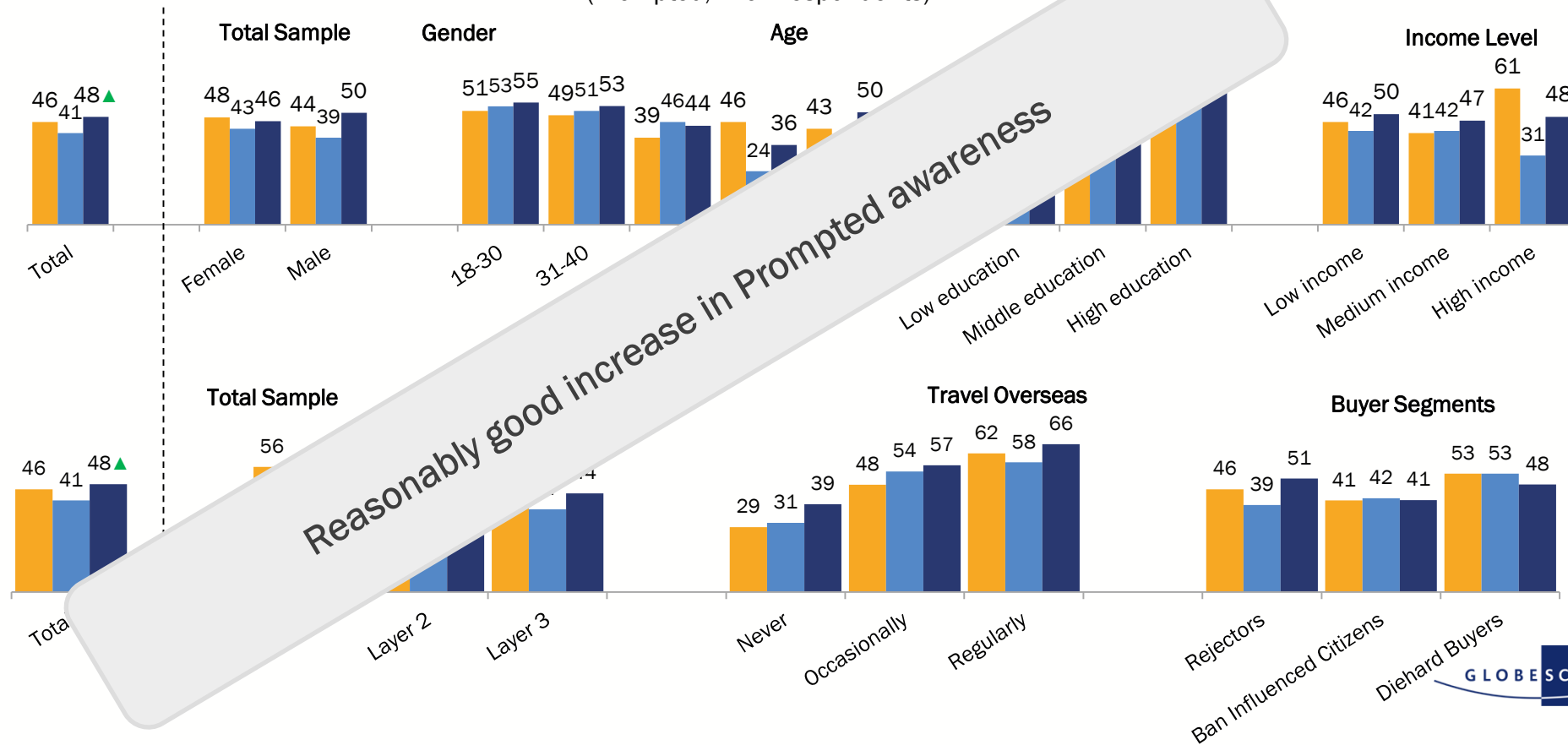
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Awareness of the Ivory Ban (Spontaneous)

3-year Comparison

Awareness of the Ivory Ban (Unprompted)
(% of Respondents)

NO major changes

Total: 4, 8, 7
City layer 3: 6, 12, 7
Regular Overseas Travelers: 7, 8, 10
Rejectors: 6, 10, 9
Ban Influenced Citizens: 4, 3, 6
Diehard Buyers: 2, 3, 4

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Awareness of the Ivory Ban (Prompted)

Comparative Year Analysis

Awareness of the Ivory Ban
(Prompted, % of Respondents)

Legend:
- 2017 Pre-ban
- 2018 Post-ban
- 2019 Post-ban

Total Sample

Total: 46, 41, 48 ▲

Total Sample

Female: 48, 43, 46
Male: 44, 39, 50

Gender

18-30: 51, 53, 55
31-40: 49, 51, 53

Age

39, 46, 44
46, 24, 36
43, 50

Low education
Middle education
High education

Income Level

Low income: 46, 42, 50
Medium income: 41, 42, 47
High income: 61, 31, 48

Total Sample

Total: 46, 41, 48 ▲

Layer 2: 56
Layer 3: 44

Travel Overseas

Never: 29, 31, 39
Occasionally: 48, 54, 57
Regularly: 62, 58, 66

Buyer Segments

Rejectors: 46, 39, 51
Ban Influenced Citizens: 41, 42, 41
Diehard Buyers: 53, 53, 48

Reasonably good increase in Prompted awareness

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The Effect of the Ban on Ivory Purchase Behavior

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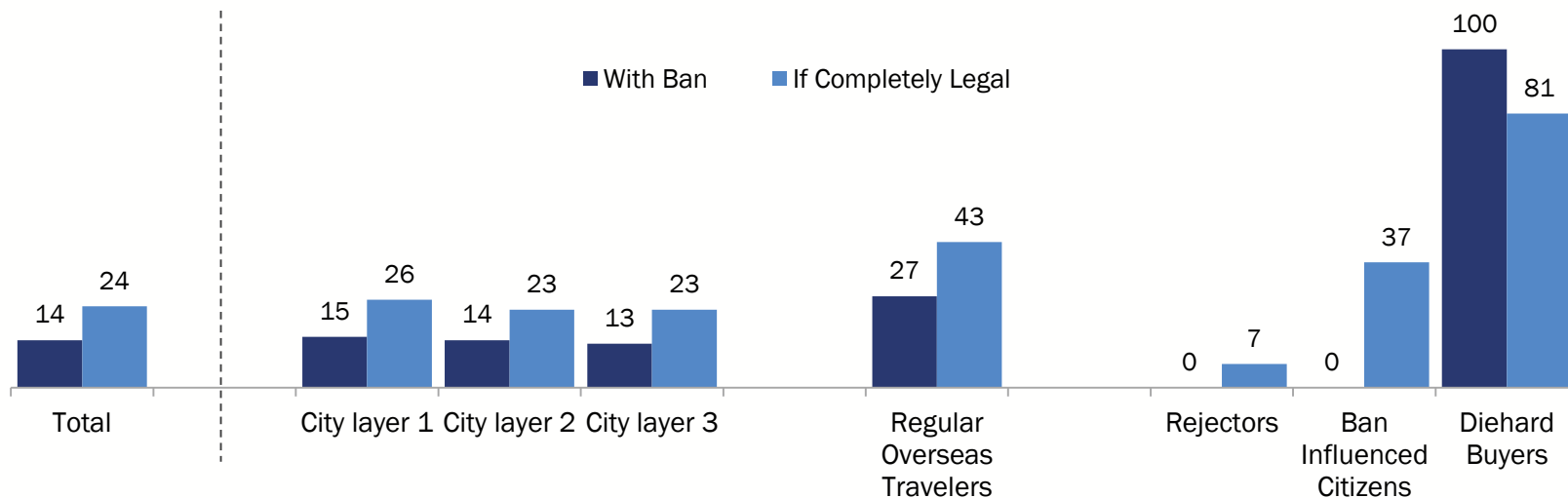
Impact of the Ban

Asked after Reading the Notice of the Ban

Impact of the Ban – % Top-3-Box (7 "Strongly agree" + 5+6)
(% of Respondents)

■ Statement related to stopping or decreasing the purchase of ivory
■ Statement related to purchasing ivory via other channels or purchasing other wildlife products

Statement	Value
Make me completely stop buying ivory	78
Make me avoid buying any wildlife products	75
Make me buy less ivory	69
Make me buy other materials (non-wildlife products) instead	42
Make me buy other types of wildlife product instead	13
Make me buy ivory only overseas (not in China)	12
Encourage people to buy more ivory via illegal channels	11
Make me buy ivory only online instead of in shops	11

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Intention to Purchase Ivory – Regulated vs Unregulated

"Very likely" + "Likely" to Purchase Ivory <u>after</u> Mentioning the Ivory Ban vs If it Is Completely Legal and Unregulated – 2019 (%)

■ With Ban   ■ If Completely Legal

	With Ban	If Completely Legal
Total	14	24
City layer 1	15	26
City layer 2	14	23
City layer 3	13	23
Regular Overseas Travelers	27	43
Rejectors	0	7
Ban Influenced Citizens	0	37
Diehard Buyers	100	81

Q17a. How likely will you be to purchase ivory and/or anything made of ivory since the ivory ban is implemented?
Q20 [2019 new question]. And if the purchase of ivory was completely legal and unregulated in Mainland China, how likely will you be to purchase ivory and/or anything made of ivory in the future?

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Campaign Recall, Recognition and Effectiveness

Awareness of Ivory Campaigns (Spontaneous)

Have You Ever Seen and/or Heard Any Campaigns or Advertisements Against Ivory Trade and/or About Elephant Protection?

Total Sample

78 22
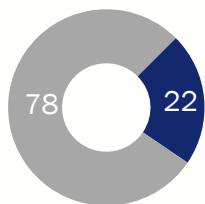
% Yes ➡

	Layer 1	Layer 2	Layer 3	Regular Overseas Travelers	Rejectors	Ban Influenced Citizens	Diehard Buyers
	n=927	n=459	n=614	n=239	n=1274	n=441	n=285
	24%	18%▼	24%	36%▲	25%▲	16%▼	21%

Campaigns and/or Elements of Campaigns Recalled Spontaneously (% among Those Who Recall Campaigns, n=450, (Open-ended Answers)

Campaign Element	%
TV	18
When the buying stops, the killing can too	13
Forum/Website/Social media	13
Transportation advertising	10
Advertisement	8
Newspaper/Press	5
Yao Ming	5
Documentary	2
Li Bingbing	2

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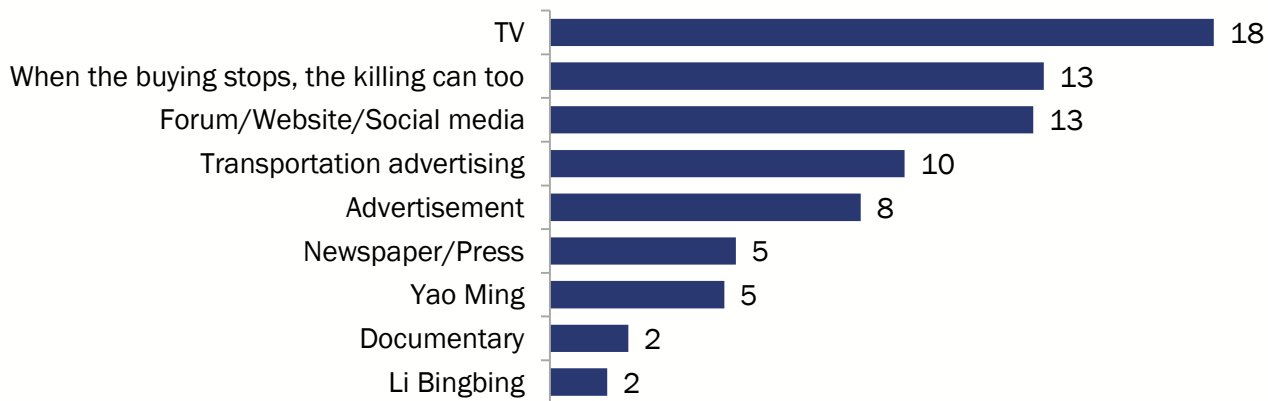
Campaign Recognition – Travel Ivory Free Campaign

Recall / Seen – Net Score across 3 Visuals
(% of respondents)
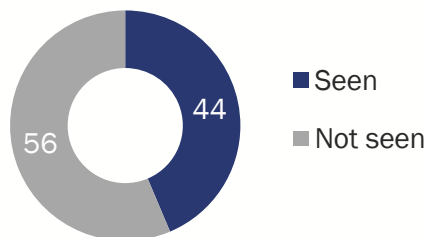
- ■ Seen — 44
- ■ Not seen — 56
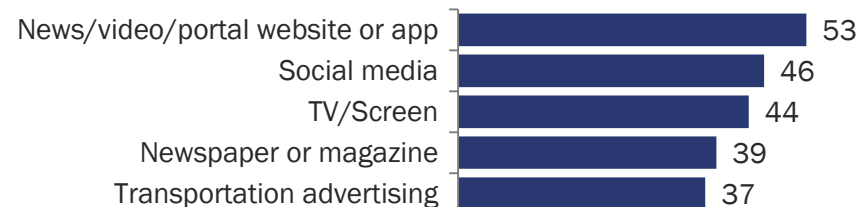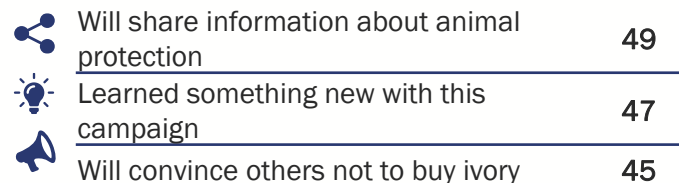
Source of Awareness [Top 5 of 9]
(% Aware of Campaign)

News/video/portal website or app	53
Social media	46
TV/Screen	44
Newspaper or magazine	39
Transportation advertising	37

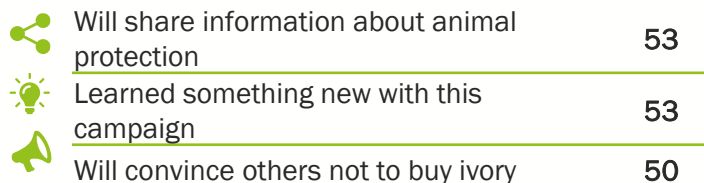*Note: Transportation advertising includes airport/subway / bus stop / bus advertising.*

Opinion/Behavior Change [Top 3 of 9]
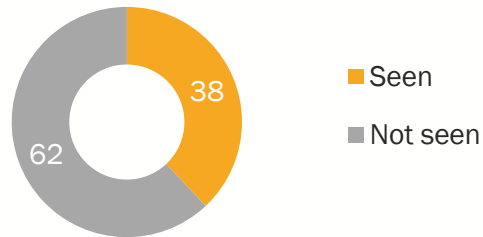(% Aware of Campaign)

Will share information about animal protection	49
Learned something new with this campaign	47
Will convince others not to buy ivory	45

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Campaign Recognition – Huang Xuan Campaign

Recall / Seen
(Net Score across 3 Visuals) (*n*=2000)
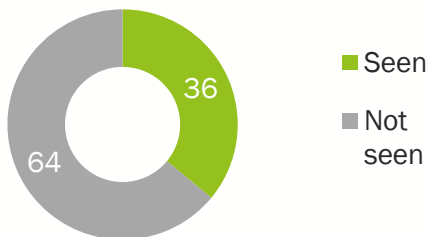
- 36 Seen
- 64 Not seen

Source of Awareness [Top 5 of 9]
(*n*=713)
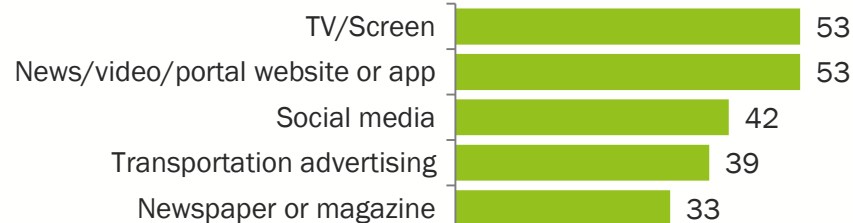
TV/Screen	53
News/video/portal website or app	53
Social media	42
Transportation advertising	39
Newspaper or magazine	33

Note: Transportation advertising includes airport/subway / bus stop / bus advertising.

Opinion/Behavior Change [Top 3 of 9]
(*n*=713)

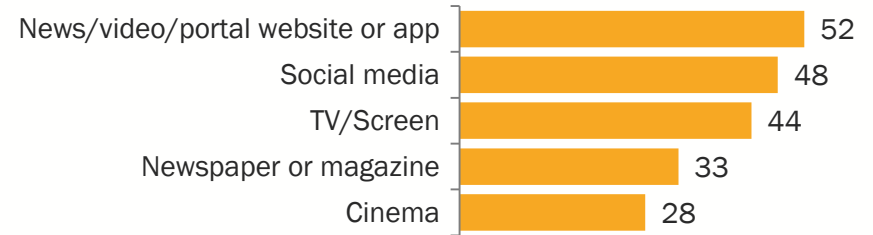|	
Will share information about animal protection	53
Learned something new with this campaign	53
Will convince others not to buy ivory	50

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Campaign Recognition – Xiao S Campaign

Recall / Seen – Net Score across 2 Visuals
(% of respondents)

- 38 ■ Seen
- 62 ■ Not seen

Source of Awareness [Top-5 of 9]
(% Aware of Campaign)

News/video/portal website or app	52
Social media	48
TV/Screen	44
Newspaper or magazine	33
Cinema	28

Opinion/Behavior Change [Top-3 of 9]
(% Aware of Campaign)

Will share information about animal protection	53
Learned something new with this campaign	47
Convinced me not to buy ivory	45

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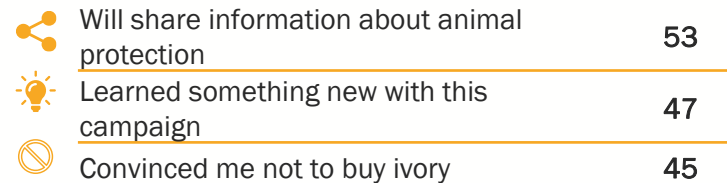
Campaign Recognition – Regular Overseas Travelers

Recall / Seen
(% of Respondents)

Travel Ivory Free Campaign

Seen	Not Seen
64	36

Huang Xuan Campaign

Seen	Not Seen
57	43

Xiao S Campaign

Seen	Not Seen
57	43

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Awareness of and Attitude toward the Ivory Ban - Overview

Awareness of the Ban

7%
Spontaneous
(2017: 4%; 2018: 8%)

→

48%
When prompted
(2017: 46%; 2018:41%)

Top Sources of Awareness

■ *Offline* channel
■ *Online* channel

1. News portal 33%
2. Television 31%
3. Social media 29%
4. Mobile news apps 27%
5. Forums 21%
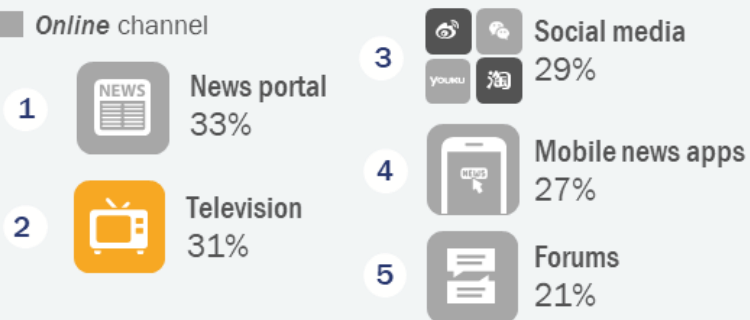
Impact of the Ivory Ban

Make me completely stop buying ivory	**78%**
Make me avoid buying any wildlife products	**75%**
Make me buy less ivory	**69%**
Make me buy other materials (non-wildlife products) instead	**42%**

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Awareness of and Attitude toward Campaigns

Campaigns Spontaneous Recall

16% (2018) → 22% (2019)

Most memorable campaign recall:

"When the buying stops, the killing can too."

Yao Ming/ Li Bing Bing

Reactions to the campaign:

Will share information about animal protection

Learned something new with this campaign

Will convince others not to buy ivory

Prompted Campaign Recognition

Seen

Travel Ivory Free Campaign — 44%

Huang Xuan Campaign — 36%

Xiao S Campaign — 38%

Top 3 Main Source of Campaign Recognition:

Television

News website/app

Social Media

4. Conclusions and Recommendations

Conclusions – Starting Points for Recommendations (1)

Past Purchase Incidence

	Total Sample	City Layer 1	City Layer 2	City Layer 3
2017	31%	30%	28%	34%
2018	14%	20%	11%	
2019	17%	20%	16%	

Top Ivory Purch

...tail in China

Short-term trips overseas

Future Purchase Intention (Total)

Before mentioning the ivory ban
After mentioning the ivory ban

43%

14%

2019

...y Purchase from Trips Outside Mainland China

18% (2018) → 27% (2019)

Top 3 destinations mentioned:

Thailand 27%   Hong Kong SAR 16%   Cambodia 13%

NO major changes – except for the overseas travel

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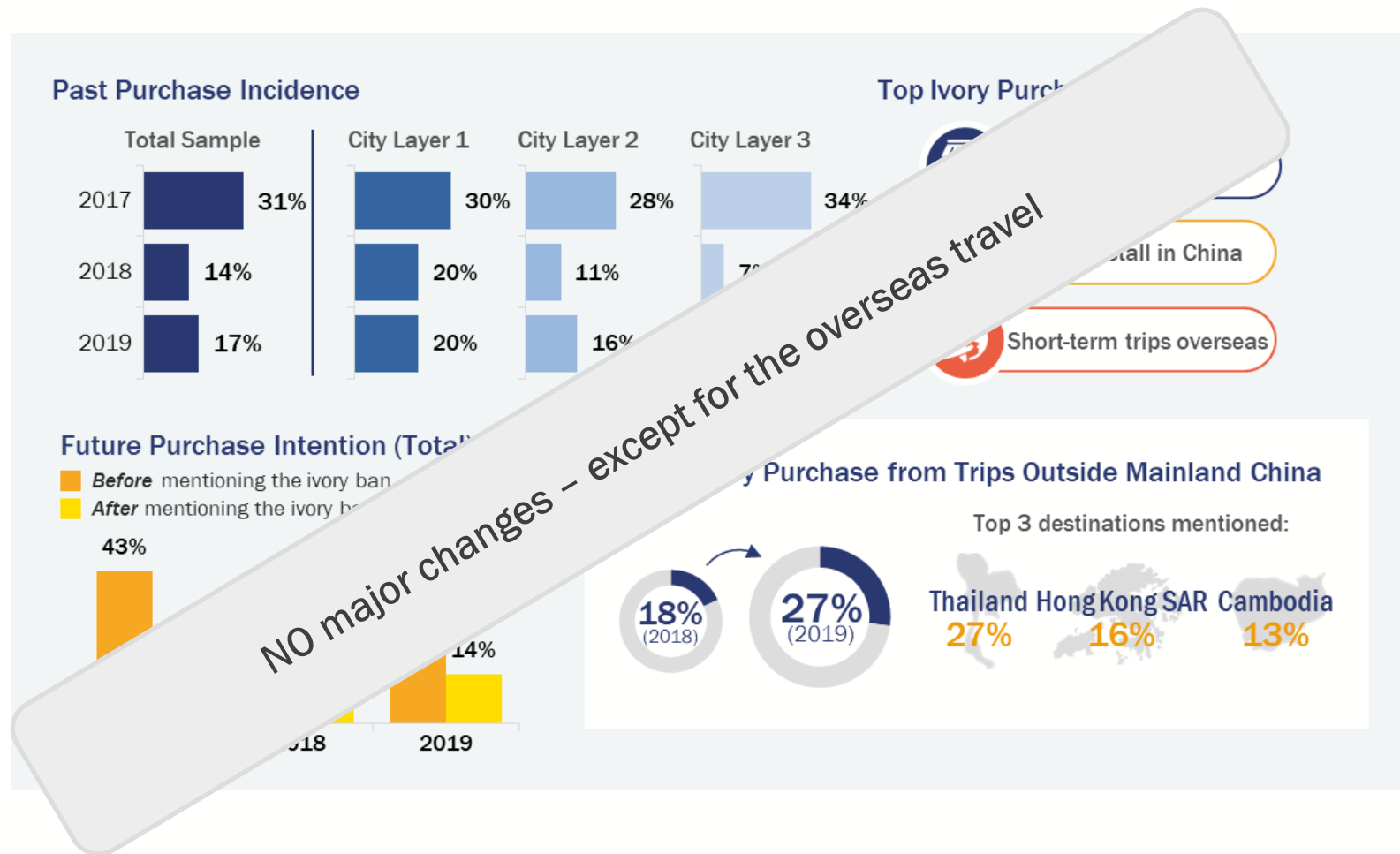
Conclusions – Starting Points for Recommendations (2)

Top Drivers and Deterrents Across all Three Segments

■ **Drivers** of Ivory Purchase
■ **Deterrents** of Ivory Purchase

Drivers	Deterrents
Ivory has great **artistic value**	I am concerned about the possible **extinction of elephants**
Ivory is **unique**	Purchasing ivory participates in **animal cruelty**
Ivory **increases its value** over time	I am concerned about the **legal consequences** of buying Ivory

Least represented opinions expressed by respondents:

- Ivory gifts help to build business relationships
- Ivory has healing powers and brings good health
- Ivory indicates wealth, power and social status

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Recommendations (1) – By Population Segment

Regular overseas travelers: Continue targeting this group

Ban Influenced Citizens: Focus on the illegality of ivory purchase

Diehard Buyers: Watch in the future

Rejectors: Continue to aim for their participation in ivory campaigns

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Recommendations (2) - Communications

✓ Focus Communications on the Ivory Ban

✓ Target elephant extinction and cruelty as messages

✓ Promote ivory alternatives

✓ Spread the message that ivory will not become more valuable

✓ Continue the message that it's illegal to bring ivory back to China

✓ Continue to use celebrities in campaigns

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Recommendations (3) – For Ivory Purchase Channels

➢ Target Cambodia as a market for Chinese travelers purchasing ivory outside of Mainland China

➢ Continue to put pressure on online trade

➢ Tailor campaigns for online sharing and television

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➢ For more information / the report: check out: https://www.linkedin.com/pulse/three-years-chinese-consumer-research-demand-ivory-what-wander-meijer/

Thank You

Q & A